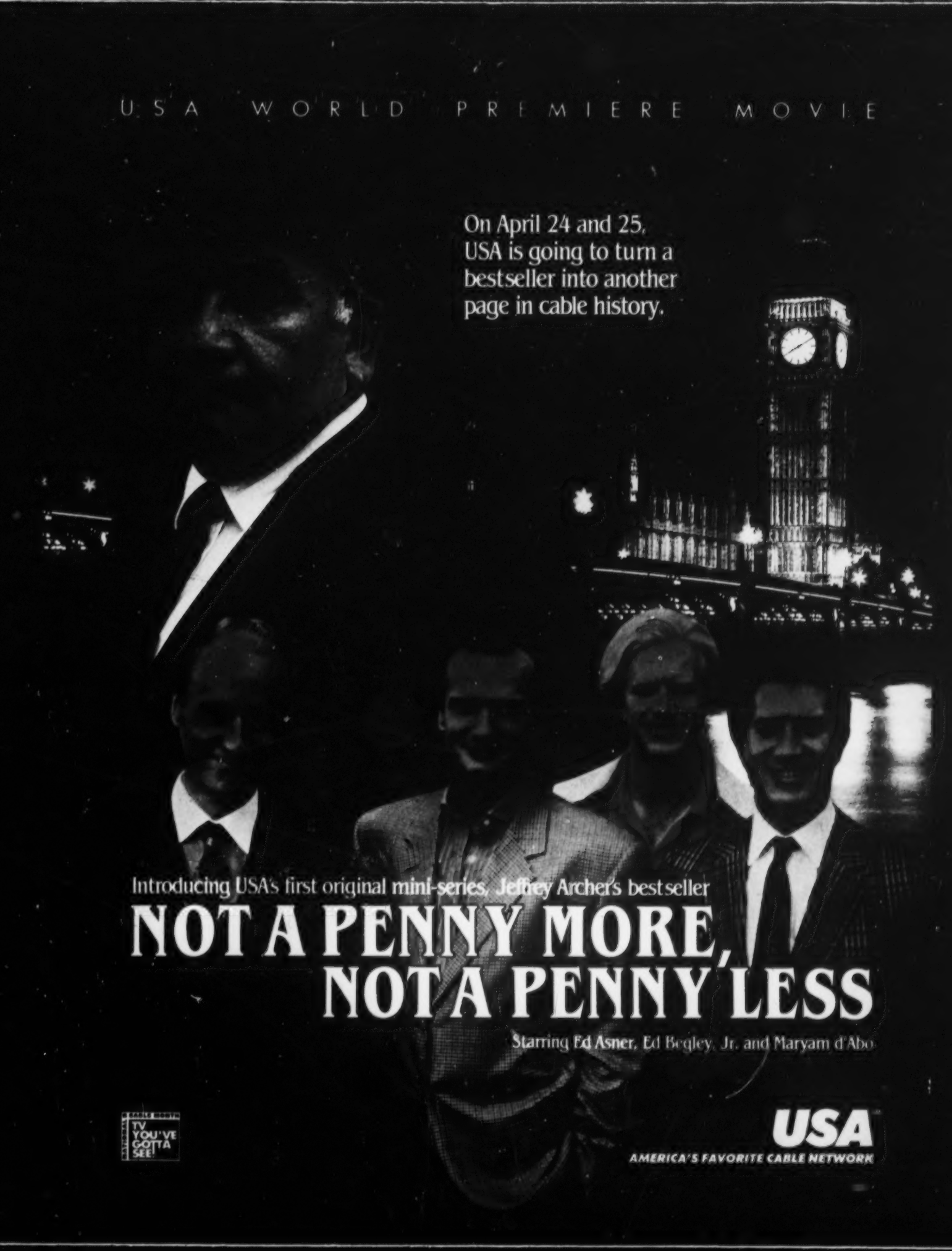
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CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT — MARCH 26, 1990

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Photo By Arnie Adler

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COMMENTARY

Decision time

A Denver cable operator has convinced a major consumer electronics retailer to market basic and pay subscriptions along with its TV sets and VCRs. Salesmen at Fred Schmid, the largest chain of its kind in the Rocky Mountains, will show customers how to order pay-per-view events at the same time they are demonstrating how to work the remote on a new, cable-ready set.

The jury is still out on how effective this ingenious alliance will prove to be, but its creator, United Cable of Colorado, appears to have come up with a strikingly simple approach to attracting customers who have resisted more tried and true methods.

The solution to cable's dilemma in advertising won't be as simple. Basic networks remain one of Madison Avenue's hottest tickets, but the chorus of complaints from media buyers grows louder with each new upfront season.

Bart McHugh, senior vice president of radio and TV programming at DDB Needham, expresses the sentiment of most ad agencies when he interjects, during the roundtable interview appearing in this issue: "We're being killed right now in man-hours—the labor it's costing us to buy network, let alone local—it's mind boggling."

McHugh and most of his peers in advertising are increasingly frustrated at how difficult it is to buy cable commercials and evaluate whether what they bought was indeed delivered. The Cabletelevision Advertising Bureau is working to solve some of the standardization problems, but without a decision by cable networks and local operators to give agencies what they need—more rigorous audience measurement and standardized affidavits to begin with—CAB's efforts will amount to nothing more than lip service.

And lip service is hardly what cable needs as it competes with an increasingly aggressive Fox Broadcasting Co., revitalized marketing departments at the big three networks and a barter syndication industry that has already fought its way to more accurate audience measurement and standardized paperwork. Nor do local operators mounting spot advertising efforts face easy competition in broadcasting's much more experienced selling force.

Unless cable wants the advertising community to stop laughing at and start listening to those cable-bashing presentations mounted by the other side, it had better admit that decision time is here.

Will cable stay hot? Or will a fall from glamour be necessary to force the industry to settle in and resolved its problems on Madison Avenue?

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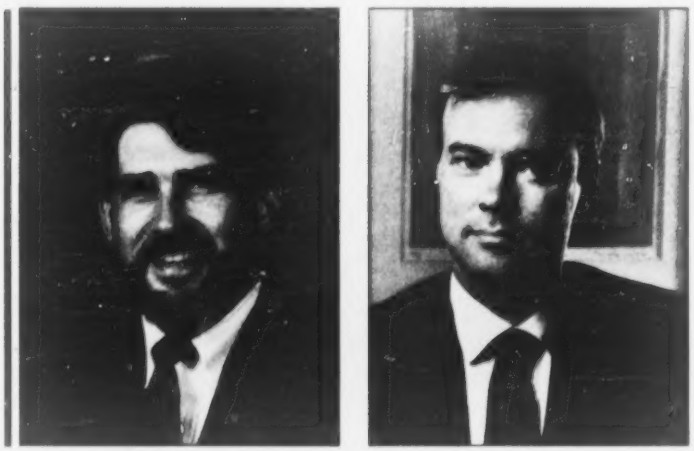
A Tale Of Two Reps

National firms stop slugging it out to agree... exclusive representation key to spot cable

By Joe Terranova



In the left corner, Cable Networks Inc.'s Peter Moran; in the right, Bob Williams from National Cable Advertising

"Our rallying cry is not even who you choose, but just make a !@@#$% choice," exhorts Pete Moran, Cable Networks Inc. senior vice president. Bob Williams, National Cable Advertising president, agrees—which in itself is big news. The fight over system affiliations is so hot, getting these guys to agree on anything ranks right up there with the "Dewey Wins" headline.

Both men are fuming over the 20 million or so insertable homes not represented by an exclusive national spot contract. And that isn't their only beef. They also disagree fundamentally about how cable national spot ought to be marketed and how the business itself should evolve.

By not signing exclusive contracts with either CNI or NCA, the only national reps serving cable operators, systems may think they're tapping business from both sources, these CEOs say, but what they're really doing is confusing agencies. Nonexclusive representation has no TV or radio parallels and "buyers don't understand," Williams says.

"All you need is one 10,000-sub system (showing up on two media plans, most likely quoted at different rates) and a deal can become a problem," he explains. So not only does the nonaligned system lose by being sold against itself, but the whole market takes a bath.

Moran sizes up this neutral notion among systems as "tripping over dollars to get to pennies." In fact, he goes further in calling for market exclusivity. "If systems continue to split markets, national spot won't grow." That's the *cable* spot market. Radio and broadcast TV spot passed the $7 billion mark last year, with cable at barely 1 percent of that.

Cable bungled about $200 million in potential spot business last year, Moran figures, because the industry refused "to let it happen." That an agency can get two schedules to analyze, two affidavits, two payment policies and bills "sets up additional obstacles to a sales process that's already one of the most difficult in media," he reasons.

Williams' position on market exclusivity is more tempered, probably because Comcast, Cox, Continental and Warner are NCA investors and he also has an agreement with Post-Newsweek and Times Mirror. Instead, he calls for "clear" rather than "exclusive" system representation by market. "Advertisers are used to calling on seven radio stations and four or five TV stations per market. That's what they're set up to do."

Over the phone, Moran—whose company is wholly-owned by, and therefore the exclusive rep for, Cablevision Systems Corp.— can be heard slapping his forehead about Williams' analogy. "But we're selling identical products," he screeches.

The usually neutral CAB sides with CNI on this one. "You can't expect reps to get excited about your market if they don't have exclusive coverage," warns vice president and local sales director Ron Fischmann.

"Why sell a market if you're not assured of getting the buy?" From the client's outlook, he adds, "Agencies see all the systems in a market as one entity and would like to deal with one exclusive agent. Otherwise, it's too time-consuming."

It also consumes lots of cash. For example, should Moran ever decide to chuck his joint sales agreement with Cable Media Inc., a Chicago regional rep, and go head-to-head with the NCA office there, he estimates it would cost over $500,000 the first year. (For purposes of this article, a *national*—as opposed to

MARKET BREAKDOWN

RANK	ADI	INSERTABLE HH (000)	CNI CLAIMS % EXCLUSIVE	NCA CLAIMS % EXCLUSIVE
1	New York	3,100	94*	1*
2	Los Angeles	1,822	27*	64*
3	Chicago	1,068	8‡	53*
4	Philadelphia	1,587	0	97‡
5	San Francisco/ Oakland/San Jose	1,087	0+	96*
6	Boston	1,209	17*	80*
7	Dallas/Ft. Worth	591	0*	0*
8	Detroit	687	0	100
9	Washington	720	0	42+
10	Houston	501	0	41
11	Cleveland	585	43*	41
12	Atlanta	563	71*	0*
13	Minneapolis/St. Paul	447	40	12
14	Tampa/St. Petersburg	729	100	0
15	Seattle/Tacoma	688	79	0
16	Miami	668	28	22
17	Pittsburgh	689	0	89
18	St. Louis	350	0	53
19	Denver	416	0	71
20	Phoenix	310	0	89
21	Sacramento/Stockton	447	0	33
22	Baltimore	347	26+	52
23	Hartford/New Haven	682	0	85
24	San Diego	594	0	100
25	Orlando/Daytona	463	75	6
TOTAL		20,350,000	6,424,020	9,847,890

*Has an office — + or is represented — in the market.

SOURCE: CNI, NCA and CableVision Magazine.

regional—rep is defined as having offices around nationwide.)

As the battle of desks now stands, CNI and NCA each have offices or representatives in eight of the top 10 markets, plus Atlanta, and CNI is also represented in Louisville by Tabler Communications. CNI claims to have invested over $5 million, not including operating expenses, to develop national spot business since Cablevision Systems purchased the company from 3M in Nov. 1987.

So Moran bristles at Williams' suggestion that, because much of CNI's business originates and winds up in New York, the company functions "like a big interconnect" and "has virtually no national spot business."

In fact, of the $16 million Williams figures CNI made last year (Moran claims $24 million), he contends $10 million of that was local New York sales. Moran declined to break out his New York numbers, while Williams reported doing $6 million out of New York, $5 million out of Boston, $2 million out of Los Angeles, and $1 million each out of Atlanta and Dallas for $16 million in '89 national sales.

Williams is equally sensitive to assertions that his company is structured to primarily serve its MSO backers. "Those investors want our company to succeed," he concedes, "but they only make up 40 percent of our affiliates."

That's about twice the ratio of Cablevision Systems subscribers to CNI exclusive households. (CNI claims 7.9 million insertable homes while NCA says it reps 17.4 million).

Ironically, CNI's ownership may prove the most troublesome to affiliates, since the MSO also sells its SportsChannel regional networks under Rainbow Advertising Sales Co. A division of RASCO, CNI could conceivably use its position to effect SportsChannel buys.

While CNI does not sell SportsChannel, Williams suggests the Rainbow-CNI relationship could be behind talk of an operator-owned metro New York interconnect. One of the area's key sales executives agrees that the general reaction is somewhere between "concerned" and "irritated." Pondering the prospect of "half the marketplace going away," Moran takes solace in having a boardroom friend—should talk turn to action—since Cablevision controls 1.2 million metro homes.

Okay, okay. So there are differences between the two firms, but for systems having to choose, what's the *difference* between them? When the question was put to Williams, he drew a picture of NCA as a determined, serious company grounded in cable sales—much like the impression he gives of himself. "Spot cable is our only business, and the guy who owns half the company runs the company."

Williams compares CNI's use of CMI in Chicago with his own use of "freelancers" in Philadelphia (Greater Phila. Cable Interconnect) and Washington (Mega Advertising). Under these arrangements, the regional and national reps split commissions on outbound business. In contrast, he defends use of regional Adlink in Los Angeles as a joint sales venture, where expenses and billings on out-

bound business are shared.

When asked to survey his company's strengths, the usually down-to-earth Moran points to "infrastructure," including 11 sales managers and "more salespeople on the street." Like Williams, he also cites a commitment to the business, but dwells more on a willingness to invest in the industry. CNI spent $300,000 on research last year and will soon unveil a system to clean up back-office backlogs that have traditionally plagued cable spot advertisers.

When it comes time to put his company's resources to work, Williams defines his job as "to position the industry at the client level. You've got to sell the razor before you sell the blades. Spot is the blade and cable is the razor."

However, the primary thrust of Williams' advocacy role, "to create a new price point for TV," is much the same as Moran's and other local sales managers' talk of effective CPMs. In other words, how do you submit a spot cable proposal for a $50 CPM (and not get thrown out of the buyer's office) when broadcast can be had for one-fifth the price?

CNI uses its Spot Cable Estimator, a mathematical slide, to pare down the broadcast audience—and, in so doing, inflate the typical $7-10 broadcast CPM—to within a 5-8 mile radius of the client's trading zone. "Who's to say $10 is the gold standard," seconds Williams.

Here Moran returns to his argument for market exclusivity. Two rep firms stalking buyers in and for the same markets is bad for the industry, he insists, and uses Los Angeles as an example. There, his sales team hawks its systems (485,000 HH) at 55 cents per thousand subscribing households, or assuming a one rating, a $54.89 CPM. Meanwhile, Moran claims, Williams' guys are off selling their 1.1 million households at 20 cents a thousand, or a $20 CPM. The opposite also happens, adds Williams.

Wishing away price-fixing laws for a moment, would Moran ever sit down with Williams and, as in the latter stages of *Monopoly* or *Risk*, trade Cleveland for Washington? "In a heartbeat," he responds.

For Williams, the next step is working with systems to identify retail groups as candidates for co-op presentations. While he also solicits business directly from agency buyers, he maintains, "these people are paid to find reasons why not." As for his field-driven strategy, he remarks, "You don't water the leaf if you want the plant to grow."

One of Williams' plant foods is value-added. "A spot on WNBC-TV, New York, is not the same as A&E on a Westchester system. It's a different audience and geography and should be sold at a different price point, combined with bill stuffers and maybe a half-hour public access show." To parlay cable's attributes into higher CPMs, Williams also records systems' ability to handle direct mail and program guide ads on CableTrack. But while Moran is all for higher rates, he has mixed feelings about value-added. "It's fine in certain instances, but it essentially says your product is not worth the price you're charging."

Yet even Moran concedes that cable spot can sometimes get out of hand. Last October, he blushes about how a 30-second NFL on ESPN spot on 44 New York-area systems cost $20,600, compared to $15,000-$18,000 that afternoon on WCBS-TV. "But they were upscale homes," he cracks. And while the example may be extreme, a modest cable spot buy in a few top markets can often be undercut by cable network prices.

Ironically, for all the word wars, there doesn't seem to be much chance of it extending to commission rates. Williams steers clear of the subject, commenting how "people who choose commission rate as the criterion for choosing a rep have chosen wrong." He concurs, however, with Moran's range of 25-30 percent.

With no related expenses, the prospect of systems adding 70 percent of national sales to their bottom lines should be a powerful incentive for would-be affiliates, maintains Moran. However, in a phenomenon not unusual for cable, it turns out to be a large percentage on a small base. The average system makes only 6-7 percent of its ad revenues on national sales, according to Mike Everett, president of the Independent Cable Representatives Association. Moran vigorously denies (another way of saying, expletive deleted) that figure, but can only offer a range of 5-30 percent in its place. He does offer, "There's no reason national can't be 35-40 percent of total sales." But at least for the present, this could be one reason why signing an exclusive contract with a national rep has not been a top priority among systems.

The other reason? Local sales usually hinge more on cost per spot than anything else. Even so, cautions Moran, "You're only going to be able to go back to your local car dealers so many times with rate increases."

Until that time, Williams says, "If you can get more locally, take it. But if you're not sold out, make room for me. And if you are sold out, add networks." And, guess what? Moran agrees. Well, not with the part about making room for Williams, but... ■

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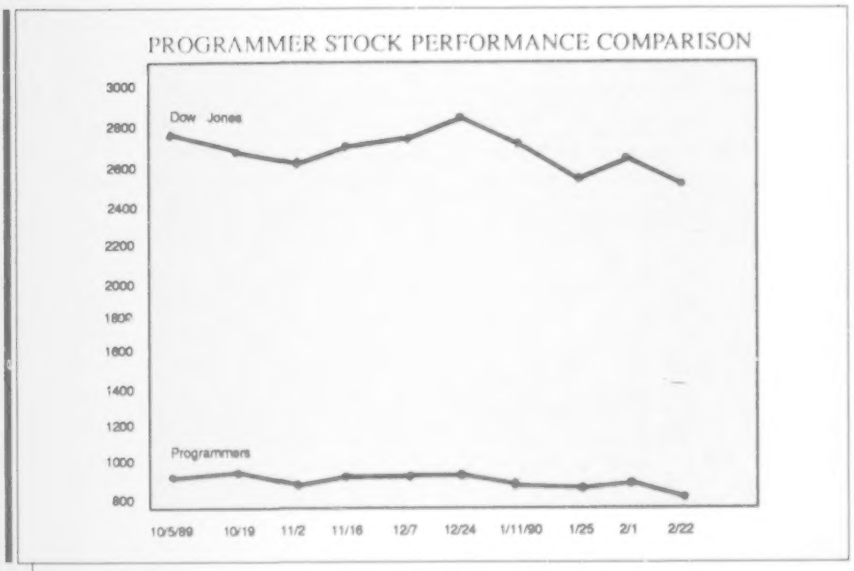

portfolios will be broken down according to industry, and if that happens cable will shine.

"No significant cable loan has even been non-performing, which is remarkable given how much leverage there is in the business," he says. "Cable will come out well among industries. It will present an opportunity for us."

Echoing that sentiment is George Smith, senior vice president and chief financial officer at Viacom Inc.

Despite bank officers' estimates that the financial logjam should break by the end of the year, Smith says his "gut" reaction is that it will occur earlier in the third quarter.

"There is a lot of money available," he says, from insurance companies and banks that are looking to buy into higher yielding loans now that the junk bond market has been foreclosed to them. In addition, because of their need to increase earnings, the banks will be under pressure to increase their loans to industries that provide them higher rates—like cable—than more conservatively-financed businesses. "They don't make money lending to triple A companies," says Smith. "As we see bank earnings decline in the first and second quarters, there will be pressure to get back into cable."

And, once the financial logjam breaks, Smith maintains, the buyers in the private system market will come swarming back.

Smith predicates his confidence on the continuing growth of cable despite the twin threats of rate regulation and DBS. "It's hard to perceive cable not growing operating income 15 percent a year," he says. That assumes 5 to 6 percent rate increases, which should be allowed under any "normal" regulatory scheme, growth in homes passed of two to five percent and another two percent a year in penetration growth.

Industry analysts agree with Smith's assessment. "I really don't think the threats will change the industry fundamentally, in any dramatic way," says Paul Napper, cable analyst at Crowell Weedon & Co. "People are still going to want to own cable systems.

"The issue is providing low-cost service to consumers and [assuring] that costs won't escalate in a dramatic way," Napper continues. "It's reasonable to assume the cable industry can provide that."

Even if programming improvements cost money, regulators will allow operators to charge more for those services or place those networks on more expensive tiers, Napper says. "I don't think the FCC wants to kill investment in cable programming."

As expected, some analysts see the recent DBS service announcements as a tool for limiting the threat of reregulation. "There is a fundamental conflict in Washington.

QUARTERLY EARNINGS CHART

Dollar amount in thousands

Company (Quarter/Fiscal Year)	Revenues	%Change	Operating Profit	%Change	Net Income	%Change
Home Shopping Network (2nd/90)	$ 261,936	20.7	$ 11,818	55.9	$ 12,810	51.6
Houston Industries (4th/89)	891,785	5.7	N.A.	N.A.	130,347	63.8
QVC Network (4th/89)	283,069	76.1	16,623	72.2	3,362	- 20.9
Turner Broadcasting (4th/89)	292,804	23.3	63,523	54.8	3,084	117.0
Video Jukebox Network (4th/89)	1,787	90.4	N.A.	N.A.	- 428	46.5
Washington Post Co. (4th/89)	381,419	2.7	80,462	35.9	51,129	27.7

Top 100 MSO's

Rank	Multiple system operator	Basic subs	
1.	Tele-Communications Inc.	6,792,535	(1/90)
2.	American Television & Communications Corp.	4,300,000	(12/89)
3.	UA Entertainment	2,592,000	(2/90)
4.	Continental Cablevision	2,525,000	(1/90)
5.	Warner Cable Communications	1,713,000	(1/90)
6.	Comcast	1,535,000	(1/90)
7.	Storer Cable Communications	1,530,000	(1/90)
8.	Cox Cable Communications	1,528,390	(1/90)
9.	Cablevision Systems	1,469,347	(2/90)
10.	Jones Intercable/Spacelink	1,307,791	(2/90)
11.	Newhouse Broadcasting	1,200,000	(11/89)
12.	Heritage Communications	1,131,343	(11/89)
13.	Times Mirror Cable TV	1,082,000	(2/90)
(15) 14.	Viacom Cable	1,016,000	(2/90)
(14) 15.	Cablevision Industries	1,012,165	(2/90)
16.	Sammons Communications	873,590	(1/90)
17.	Century Communications	825,000	(2/90)
18.	Adelphia Communications*	817,000	(3/90)
19.	Paragon Communications	764,734	(1/90)
(21) 20.	Falcon Cable TV	700,000	(10/89)
(20) 21.	Cooke Cablevision	591,032	(12/89)
22.	Telecable	584,552	(1/90)
23.	KBLCOM	550,000	(2/90)
24.	Scripps-Howard	540,000	(1/90)
25.	Multivision Cable TV	499,491	(1/90)
26.	Tele-Media	475,163	(9/89)
27.	Prime Cable	468,822	(1/90)
28.	Lenfest Group	440,983	(1/90)
29.	Maclean Hunter Cable TV	437,500	(1/90)
30.	Post-Newsweek Cable	413,213	(1/90)
31.	Cencom Cable	410,000	(11/89)
32.	TCA Group	405,000	(1/90)
33.	Multimedia Cablevision	328,902	(1/90)
34.	Colony Communications	327,924	(1/90)
35.	Simmons Communications	315,000	(12/89)
36.	Rifkin & Associates	312,700	(1/90)
37.	TKR Cable	293,212	(2/90)
38.	Western Communications	287,800	(1/90)
39.	Triax Communications	279,612	(1/90)
40.	Star Cablevision Group	240,096	(8/89)
41.	Hauser Communications	238,000	(1/90)
42.	Service Electric Cable TV Inc.	220,000	(1/90)
43.	Greater Media	205,000	(9/89)
44.	King Videocable	193,413	(1/90)
(47) 45.	Columbia International	191,000	(3/90)
(45) 46.	Sutton Capital	189,179	(9/89)
(46) 47.	Harron Communications	184,344	(1/90)
48.	Media General	181,785	(1/90)
49.	Insight Communications	183,000	(2/90)
50.	C-TEC Cable Systems	175,000	(2/90)
51.	U.S. Cable Corp.	172,500	(1/90)
52.	Palmer Communications	166,059	(1/90)
53.	Armstrong Utilities	153,902	(1/90)
54.	Northland Communications	141,398	(11/89)
55.	Summit Communications	141,000	(10/89)
56.	Jones/Crown Cable	136,000	(1/90)
57.	Bresnan Communications	129,780	(1/90)
58.	Booth Communications	125,437	(1/90)
59.	McDonald Group	125,000	(1/90)
60.	Susquehanna Broadcasting	117,109	(1/90)
61.	United Video Management	117,000	(1/90)
62.	Pencor Services	108,564	(1/90)
63.	Sonic Communications	97,837	(12/89)
64.	Midcontinent Cable Systems Co.	95,550	(6/89)
65.	WEHCO Video	95,666	(1/90)
66.	First Carolina Communications	94,253	(1/90)
67.	Gilbert Media	93,000	(1/90)
(74) 68.	Chambers Communications	89,100	(3/90)
(68) 69.	Coaxial Communications	83,300	(5/89)
(69) 70.	Barden Cablevision	79,783	(1/90)
(79) 71.	InterMedia Partners	78,000	(3/90)
(70) 72.	James Cable Partners	76,756	(1/90)
(71) 73.	Mission Cable	74,223	(1/90)
(72) 74.	Douglas Communications	72,400	(1/90)
(76) 75.	Leonard Communications	66,000	(2/90)
(73) 76.	Fanch Communications	65,000	(1/90)
(74) 77.	Cardinal Comunications	61,287	(1/90)
(77) 78.	Omega Communications	60,000	(8/89)
(78) 79.	Helicon Corp.	60,000	(1/90)
80.	Telesat Cablevision Inc.	57,235	(6/89)
81.	Galaxy Cablevision	56,489	(2/90)
82.	State Cable TV	56,200	(1/90)
83.	Prestige Cable TV Inc.	52,774	(1/90)
84.	New England Cablevision	52,409	(1/90)
85.	Masada Corp.	52,000	(2/90)
(87) 86.	Star Cable Associates	51,875	(2/90)
(88) 87.	Rock Associates	49,053	(1/90)
(89) 88.	Donrey Media Group	49,040	(12/89)
(90) 89.	Republic Communications Corp.	47,000	(1/90)
(91) 90.	Cable America Corp.	46,101	(11/89)
(92) 91.	360 Corp.	45,000	(5/89)
(93) 92.	CableSouth Inc.	43,420	(10/89)
(94) 93.	Cable Holdings Inc.	43,135	(10/89)
(95) 94.	Eastern Connecticut Cable TV	41,820	(6/89)
(96) 95.	CA Media	41,275	(7/89)
(97) 96.	Raystay Co.	40,447	(8/89)
(98) 97.	Acton Corp.	40,400	(3/89)
(99) 98.	Schurz Communications	40,078	(8/89)
(100) 99.	Benchmark Communications	38,000	(1/90)
(new) 100.	Charter Cable	36,000	(2/90)

( ) Rank last listing

*** reflects Joseph Gans acquisition**

Subscriber counts are provided by MSOs and systems to Cable Vision. *Figures will be updated quarterly unless information is provided by MSOs or systems. Send updates to Cable Stats, 345 Park Avenue So., 9th Floor, New York, NY 10010.*

Top 100 Systems

Rank	Location	Operator	Basic subs	
1.	Long Island, NY	Cablevision Systems	523,307	(2/90)
2.	Orlando/Central Complex, FL	ATC	400,000	(10/89)
3.	San Diego, CA	Cox Cable	303,637	(6/89)
4.	San Antonio, TX	KBLCOM	234,835	(6/89)
5.	Puget Sound, WA	Viacom	234,200	(1/90)
6.	Manhattan, NY	ATC	231,864	(6/89)
7.	Phoenix, AZ	Times Mirror	220,968	(5/89)
8.	East Orange, NJ	Maclean Hunter	212,000	(6/89)
9.	Honolulu, HI	ATC	206,251	(10/89)
10.	Chicago (suburbs), IL	Continental	181,537	(9/89)
11.	Rochester, NY	ATC	180,000	(9/89)
12.	Wayne, NJ	UA Entertainment	179,624	(2/90)
13.	Houston, TX	Warner	179,000	(9/89)
14.	Louisville/Jeff. Co., KY	Storer Communications	170,000	(8/89)
15.	Brooklyn/Queens, NY	ATC	170,000	(1/90)
16.	Cleveland, OH	Cablevision Systems	168,367	(2/90)
17.	Cherry Hill, NJ	Garden State Cable	168,000	(9/89)
18.	Cincinnati, OH	Warner	167,000	(6/89)
19.	Atlanta, GA	Prime Cable	166,000	(9/89)
20.	Hampton Roads, VA	Cox Cable	164,699	(6/89)
21.	Fairfax, VA	Media General	164,519	(6/89)
22.	Connecticut Complex	Cablevision Systems	162,167	(2/90)
23.	Tulsa, OK	UA Entertainment	159,551	(7/89)
24.	Kansas City, MO	ATC	158,500	(11/89)
25.	Jacksonville, FL	Continental Cablevision	154,600	(5/89)
26.	Hartford/Plainville/Vernon, CT	UA Entertainment	152,683	(6/89)
27.	Montgomery County, MO/ Arlington, VA	Hauser	150,000	(1/90)
28.	Chicago, IL	TCI	148,857	(4/89)
29.	Charlotte, NC	ATC	148,850	(9/89)
30.	San Jose/Campbell, CA	Heritage	145,000	(6/89)
31.	Baltimore County, MD	Comcast	144,000	(6/89)
32.	Memphis/W. Memphis, TN	ATC	143,957	(10/89)
33.	Manhattan, NY	Paragon	143,500	(6/89)
34.	San Francisco, CA	Viacom	141,600	(1/90)
35.	Pompano, FL	Continental	140,084	(9/89)
36.	Buffalo, NY	Adelphia Communications	139,515	(8/89)
37.	Denver (suburbs), CO	UA Entertainment	139,303	(6/89)
38.	San Diego, CA	ATC	135,300	(11/89)
39.	St. Louis, MO	Cencom	135,230	(8/89)
40.	Austin, TX	ATC	126,100	(10/89)
41.	Chicago Suburbs, IL	Jones	126,000	(2/90)
42.	Martin/Stuart Co, FL	ATC	125,000	(10/89)
43.	Seattle, WA	TCI	124,613	(8/89)
44.	Warren, NJ	TKR	124,000	(2/90)
45.	Tacoma, WA	Viacom	120,700	(1/90)
46.	Pinellas County, FL	Newhouse	114,808	(6/89)
47.	Hillsborough/Tampa, FL	Paragon	112,103	(1/90)
48.	Wilmington, DE	Heritage	112,000	(6/89)
49.	Grand Rapids, MI	UA Entertainment	111,198	(6/89)
50.	San Diego County, CA	Times Mirror	111,029	(5/89)
51.	Toledo, OH	Blade Communications	110,785	(5/89)
52.	Southeast Michigan	Comcast	110,000	(6/89)
53.	Raleigh/Durham, NC	ATC	109,000	(9/89)
54.	Las Vegas, NV	Prime Cable	107,288	(5/89)
55.	Dallas, TX	Heritage	107,244	(6/89)
56.	Jefferson Parish/Kenner, LA	Cox Cable	106,332	(6/89)
57.	San Juan, PR	Multivision Cable	106,046	(6/89)
58.	Boston/Brookline, MA	Cablevision Systems	105,785	(2/90)
59.	Nashville, TN	Viacom	105,400	(1/90)
60.	Indianapolis, IN	Comcast	104,000	(6/89)
61.	Chicago, IL	Group W	104,000	(3/90)
62.	Richmond, VA	Continental	102,121	(10/89)
63.	Pittsburgh, PA	TCI	98,952	(8/89)
64.	Jackson, MS	ATC	98,915	(10/89)
65.	Monmouth, NJ	Sutton Capital	97,579	(9/89)
66.	Greensboro, NC	ATC	96,140	(10/89)
67.	St. Petersburg, FL	Paragon	95,412	(2/89)
68.	Columbus, OH	Warner	95,000	(9/89)
69.	Reading, PA	ATC	95,000	(10/89)
70.	Naples, FL	Palmer	94,450	(6/89)
71.	Worcester Complex, MA	Greater Media	94,897	(9/89)
72.	Albuquerque, NM	Jones Intercable	91,205	(12/89)
73.	Portland, OR	KBLCOM	91,500	(8/89)
74.	Dade/Broward County, FL	Storer	90,000	(8/89)
75.	Wichita, KS	Multimedia	88,732	(9/89)
76.	Independence,MO	Jones	88,628	(8/89)
77.	Minneapolis/St. Paul suburbs, MN	Hauser	88,000	(1/90)
78.	Fresno, CA	Continental	87,060	(2/90)
79.	Tucson, AZ	Cooke	86,976	(8/89)
80.	Akron, OH	Warner	86,000	(9/89)
81.	Fayetteville, NC	ATC	86,000	(10/89)
82.	Milwaukee, WI	Warner	86,000	(9/89)
83.	Toms River, NJ	Adelphia	85,826	(2/90)
84.	Harrisburg, PA	Sammons	85,200	(8/89)
85.	Orange County, CA	KBLCOM	85,100	(8/89)
86.	Baton Rouge, LA	UA Entertainment	84,976	(6/89)
87.	Dover/Morristown, NJ	Sammons	84,640	(8/89)
88.	South Bend, IN	Heritage	82,744	(6/89)
89.	Houston Suburbs, TX	Prime Cable	82,000	(6/89)
90.	Medford, MA	Warner	82,000	(6/89)
91.	W. San Fernando Valley, CA	CV Industries	81,810	(2/90)
92.	Buffalo, NY	TCI	81,358	(7/89)
93.	Oakland County, MI	UA Entertainment	80,564	(8/89)
94.	Oklahoma City, OK	Cox Cable	79,104	(6/89)
95.	New Orleans, LA	Cox Cable	78,979	(6/89)
96.	Providence/Warwick, RI	Times Mirror	78,528	(6/89)
97.	Columbia, SC	CV Industries	78,317	(2/90)
98.	Allentown, PA	Service Electric	78,000	(8/89)
99.	Thousand Oaks, CA	Western	78,000	(8/89)
100.	Indianapolis, IN	ATC	75,715	(10/89)